

# Update Federal/State Tax Information

## Overview

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**Introduction** This document provides the procedure for updating your federal or state tax information in Retired Global Pay Self-Service.

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**Discussion** This application gives you the ability to update your federal and state tax information.

*Federal Tax Changes:*

- When your retirement account is created, the federal tax information from your active duty account will be used unless specified differently on your CG-4700. If specified differently, your RAS technician will update the information.
- You will be able to update your marital status, number of withholding allowances, and additional withholding amount.
- The minimum amount for federal additional tax withholding is \$1.00 and the maximum is \$2000.00.

*State Tax Changes:*

- When your retirement account is created, your state of residence will be based on your mailing address state, unless specified differently on your CG-4700. If specified differently, your RAS technician will update the information.
  - You will be able to update your state of residence for state tax purposes and additional withholding amount.  
**Note:** You will not be allowed to change your state of residence to a state that doesn't have an agreement with the Coast Guard to withhold state taxes.
  - The minimum amount for state additional tax withholding is \$10.00 and the maximum is \$1000.00.
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# Update Federal Tax Information

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**Introduction** This guide provides the procedures to update federal tax information in Retired Global Pay Self Service.

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**Procedures** Log into DA Self Service at <https://portal.direct-access.us/> and follow the steps below.

Step	Action														
1	<p>Select the <b>Change My Federal &amp; State Tax</b> link from the home page menu.</p> <table><tr><td><a href="#">View My Payslip</a> This link will take you to a list of all available payslips to view and/or download.</td><td><a href="#">View/Print My Year End Forms</a> Access year-end ACA, W2, and 1099R forms and choose to forego receiving a paper copy of your tax forms in the mail.</td></tr><tr><td><a href="#">View My 1099R</a> This link will take you to a list of all available 1099R tax documents to view and/or download.</td><td><a href="#">View/Change My Mailing Address</a> This link will allow you to view and make changes to your mailing address.</td></tr><tr><td><a href="#">View/Change My Phone Number(s)</a> This link will allow you to view, add, or update their phone number(s).</td><td><a href="#">Change My EFT/Direct Deposit</a> This link will take you to view and/or change your EFT/Direct Deposit.</td></tr><tr><td><a href="#">Change My Delivery Options</a> This link will allow you to change delivery options for communications.</td><td><a href="#">Change My Voluntary Deductions</a> This link will take you to view, add, change, or stop your voluntary deductions.</td></tr><tr><td><a href="#">View/Change My Email Address</a> This link will take you to view and/or change your email addresses stored in the Retired Payroll system.</td><td><a href="#">Change My Password</a> This link will allow you to change your password and set your Forgot Password security question/answer.</td></tr><tr><td><a href="#">View My Final Pay Beneficiary</a> Self-service users will use this link to view their Final Pay Beneficiaries</td><td><a href="#">Change My Federal &amp; State Tax</a> Review or change your W-4 information.</td></tr><tr><td><a href="#">View/Print ACA Forms</a> View/Print ACA Forms</td><td></td></tr></table>	<a href="#">View My Payslip</a> This link will take you to a list of all available payslips to view and/or download.	<a href="#">View/Print My Year End Forms</a> Access year-end ACA, W2, and 1099R forms and choose to forego receiving a paper copy of your tax forms in the mail.	<a href="#">View My 1099R</a> This link will take you to a list of all available 1099R tax documents to view and/or download.	<a href="#">View/Change My Mailing Address</a> This link will allow you to view and make changes to your mailing address.	<a href="#">View/Change My Phone Number(s)</a> This link will allow you to view, add, or update their phone number(s).	<a href="#">Change My EFT/Direct Deposit</a> This link will take you to view and/or change your EFT/Direct Deposit.	<a href="#">Change My Delivery Options</a> This link will allow you to change delivery options for communications.	<a href="#">Change My Voluntary Deductions</a> This link will take you to view, add, change, or stop your voluntary deductions.	<a href="#">View/Change My Email Address</a> This link will take you to view and/or change your email addresses stored in the Retired Payroll system.	<a href="#">Change My Password</a> This link will allow you to change your password and set your Forgot Password security question/answer.	<a href="#">View My Final Pay Beneficiary</a> Self-service users will use this link to view their Final Pay Beneficiaries	<a href="#">Change My Federal &amp; State Tax</a> Review or change your W-4 information.	<a href="#">View/Print ACA Forms</a> View/Print ACA Forms	
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## Update Federal Tax Information, Continued

Procedures,  
continued

Step	Action
2	<p>Your current federal tax information will display. The page shows when your federal taxes were last updated. It also shows your current mailing address. If it's incorrect, please update it via the View/Change My Mailing Address self-service page.</p> <div data-bbox="316 607 1374 1653"> <p><b>W-4 Tax Information</b></p> <p>Joe Coastie US COAST GUARD RETIRED                      Social Security Number: 123-45-6789</p> <p>You must complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Because your tax situation may change, you may want to refigure your withholding each year.</p> <p>Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.</p> <p>You last updated this information on Mar 13, 2017</p> <p><b>Mailing Address</b></p> <p>123 Cutter Blvd Seashore, CA 90210</p> <p><b>W-4 Tax Data</b></p> <p>Indicate Tax Status</p> <p><input type="radio"/> Single</p> <p><input checked="" type="radio"/> Married</p> <p><input type="radio"/> Married/Withhold Single      (Married, but withhold at higher single rate)</p> <p>Total number of Allowances you are claiming: <input type="text" value="4"/></p> <p>Enter Additional Amount, if any, you want withheld from each paycheck: <input type="text" value="50.000000"/></p> <p><input type="checkbox"/> If your last name differs from that shown on your social security card, check here</p> <p>You must call 1-800-772-1213 for a new card.</p> <p><b>Claim Exemption</b></p> <p>I claim exemption from withholding for: <input type="text" value="2017"/> and I certify that I meet BOTH of the following conditions for exemption:</p> <p>&gt;&gt; Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability; AND</p> <p>&gt;&gt; This year I expect a refund of ALL Federal income tax withheld because I expect to have no tax liability.</p> <p><input type="checkbox"/> If you meet both conditions, check "Exempt" here:</p> <p>Note: If Marital Status and/or Allowances is changed and Exempt is checked, then Exempt will take precedence over your prior selection of Marital Status and Allowances.</p> <p><input type="button" value="Submit"/> Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate or entitled to claim exempt status.</p> <p>Go To: <a href="#">Official Form W-4</a>      <a href="#">State Tax Information</a></p> </div>
3	<p>Click on the <b>Marital Status</b> you want your federal taxes based on.</p> <div data-bbox="316 1711 1273 1908"> <p><b>W-4 Tax Data</b></p> <p>Indicate Tax Status</p> <p><input type="radio"/> Single</p> <p><input checked="" type="radio"/> Married</p> <p><input type="radio"/> Married/Withhold Single      (Married, but withhold at higher single rate)</p> </div>

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## Update Federal Tax Information, Continued

Procedures,  
continued



Step	Action
4	<p>Enter the <b>number of allowances</b> you want. Leave the field blank if you wish to have zero allowances.</p> <p>Total number of Allowances you are claiming: <input type="text" value="4"/></p>
5	<p>Enter the <b>additional amount</b> of federal tax you want withheld from your retirement pay each month. If you want to remove the additional amount, then just delete the existing amount.</p> <p>Enter Additional Amount, if any, you want withheld from each paycheck: <input type="text" value="50.00"/></p> <p><b>Note:</b> The minimum amount for federal additional tax withholding is \$1.00 and the maximum is \$2000.00.</p>
6	<p>Check the <b>box</b> if applicable.</p> <p><input type="checkbox"/> If your last name differs from that shown on your social security card, check here You must call 1-800-772-1213 for a new card.</p>
7	<p>If you are exempt from federal taxes, check the <b>box</b> where it says, "If you meet both conditions, check "Exempt" here". Taxable gross will be maintained but no FWT will be withheld.</p> <p><b>Claim Exemption</b></p> <p>I claim exemption from withholding for: <input type="text" value="2017"/> and I certify that I meet BOTH of the following conditions for exemption:</p> <p>&gt;&gt; Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability; AND</p> <p>&gt;&gt; This year I expect a refund of ALL Federal income tax withheld because I expect to have no tax liability.</p> <p><input type="checkbox"/> If you meet both conditions, check "Exempt" here:</p> <p>Note: If Marital Status and/or Allowances is changed and Exempt is checked, then Exempt will take precedence over your prior selection of Marital Status and Allowances.</p>
8	<p>Click the <b>Submit</b> button.</p> <p><input type="button" value="Submit"/> Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate or entitled to claim exempt status.</p>
9	<p>Enter your <b>Password</b> and click <b>Continue</b>.</p> <p><b>Verify Identity</b> <span>Help</span></p> <p>To protect your privacy, verify your identity by typing your password. If you are not this user, click <b>Sign Out</b>.</p> <p>User ID: 1234567</p> <p>Password: <input type="password" value="....."/></p> <p><input type="button" value="Continue"/> <input type="button" value="Cancel"/></p>

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## Update Federal Tax Information, Continued

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Procedures,  
continued

Step	Action
10	<p>The confirmation page should appear. Click <b>OK</b>.</p> <div><p><b>Submit Confirmation</b></p><p> The Submit was successful.</p><p> However, due to timing, your change may not be reflected on the next paycheck.</p></div> <p><b>VERY IMPORTANT:</b> You must click OK for the changes to occur.</p>
11	<p>You will be taken back to the W4 Tax Information page. If you wish to update your state tax information, follow the steps in the next guide. If you're done with updating taxes, click on the <b>Home</b> link.</p>

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# Update State Tax Information

**Introduction** This guide provides the procedures to update state tax information in Retired Global Pay Self Service.

**Before you begin** The following states/territories do NOT have state income tax. You will NOT be able to withhold state taxes on them.

- Alaska
- Florida
- Nevada
- New Hampshire
- South Dakota
- Tennessee
- Texas
- Washington
- Wyoming
- Federated States of Micronesia (FM)
- Republic of the Marshall Islands (MH)
- Palau (PW)

**Procedures** Log into DA Self Service at <https://portal.direct-access.us/> and follow the steps below.

Step	Action														
1	<p>Select the <b>Change My Federal &amp; State Tax</b> link from the home page menu.</p> <table><tr><td><a href="#">View My Payslip</a> This link will take you to a list of all available payslips to view and/or download.</td><td><a href="#">View/Print My Year End Forms</a> Access year-end ACA, W2, and 1099R forms and choose to forego receiving a paper copy of your tax forms in the mail.</td></tr><tr><td><a href="#">View My 1099R</a> This link will take you to a list of all available 1099R tax documents to view and/or download.</td><td><a href="#">View/Change My Mailing Address</a> This link will allow you to view and make changes to your mailing address.</td></tr><tr><td><a href="#">View/Change My Phone Number(s)</a> This link will allow you to view, add, or update their phone number(s).</td><td><a href="#">Change My EFT/Direct Deposit</a> This link will take you to view and/or change your EFT/Direct Deposit.</td></tr><tr><td><a href="#">Change My Delivery Options</a> This link will allow you to change delivery options for communications.</td><td><a href="#">Change My Voluntary Deductions</a> This link will take you to view, add, change, or stop your voluntary deductions.</td></tr><tr><td><a href="#">View/Change My Email Address</a> This link will take you to view and/or change your email addresses stored in the Retired Payroll system.</td><td><a href="#">Change My Password</a> This link will allow you to change your password and set your Forgot Password security question/answer.</td></tr><tr><td><a href="#">View My Final Pay Beneficiary</a> Self-service users will use this link to view their Final Pay Beneficiaries</td><td><a href="#">Change My Federal &amp; State Tax</a> Review or change your W-4 information.</td></tr><tr><td><a href="#">View/Print ACA Forms</a> View/Print ACA Forms</td><td></td></tr></table>	<a href="#">View My Payslip</a> This link will take you to a list of all available payslips to view and/or download.	<a href="#">View/Print My Year End Forms</a> Access year-end ACA, W2, and 1099R forms and choose to forego receiving a paper copy of your tax forms in the mail.	<a href="#">View My 1099R</a> This link will take you to a list of all available 1099R tax documents to view and/or download.	<a href="#">View/Change My Mailing Address</a> This link will allow you to view and make changes to your mailing address.	<a href="#">View/Change My Phone Number(s)</a> This link will allow you to view, add, or update their phone number(s).	<a href="#">Change My EFT/Direct Deposit</a> This link will take you to view and/or change your EFT/Direct Deposit.	<a href="#">Change My Delivery Options</a> This link will allow you to change delivery options for communications.	<a href="#">Change My Voluntary Deductions</a> This link will take you to view, add, change, or stop your voluntary deductions.	<a href="#">View/Change My Email Address</a> This link will take you to view and/or change your email addresses stored in the Retired Payroll system.	<a href="#">Change My Password</a> This link will allow you to change your password and set your Forgot Password security question/answer.	<a href="#">View My Final Pay Beneficiary</a> Self-service users will use this link to view their Final Pay Beneficiaries	<a href="#">Change My Federal &amp; State Tax</a> Review or change your W-4 information.	<a href="#">View/Print ACA Forms</a> View/Print ACA Forms	
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## Update State Tax Information, Continued

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Procedures,  
continued

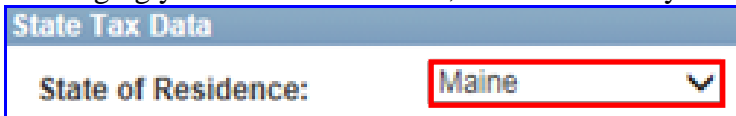
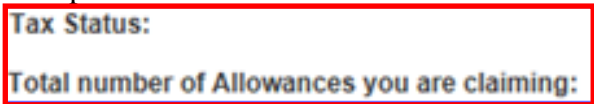
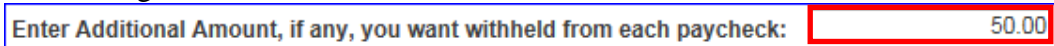
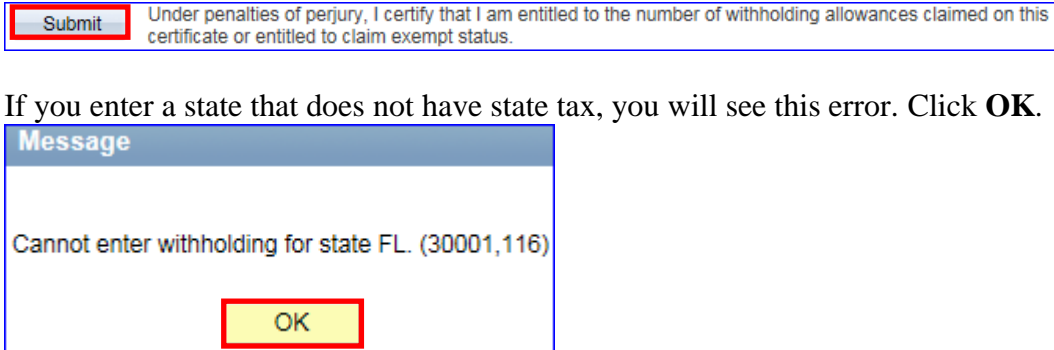
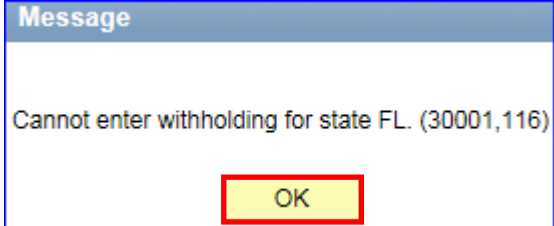
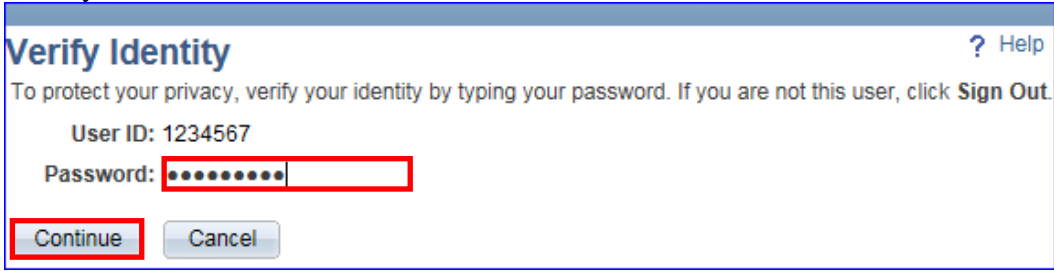
Step	Action
2	<p>The system will take you to your current federal tax information. Click on the <b>State Tax Information</b> link at the bottom of the page.</p> <p>Go To: <a href="#">Official Form W-4</a> <a href="#">State Tax Information</a></p>
3	<p>Your current state tax information will display. The page shows when your state taxes were last updated. It also shows your current mailing address. If it's incorrect, please update it via the View/Change My Mailing Address self-service page.</p> <div><p><b>State Tax Information</b></p><p>Joe Coastie US COAST GUARD RETIRED Social Security Number: 123-45-6789</p><p>Enter your State of Residence for tax purposes. Enter the monthly state tax you desire to be withheld from your retired pay. The minimum amount is \$10.00, the maximum is \$1,000.00. If you wish to elect more, contact your RAS technician. If you have any questions, please contact PPC (RAS) at 1-800-772-8724.</p><p>You last updated this information on Mar 13, 2017</p><p><b>Mailing Address</b></p><p>123 Cutter Blvd Seashore, CA 90210</p><p><b>State Tax Data</b></p><p>State of Residence: <input type="text" value="Maine"/></p><p>Tax Status:</p><p>Total number of Allowances you are claiming:</p><p>Enter Additional Amount, if any, you want withheld from each paycheck: <input type="text"/></p><p><input type="button" value="Submit"/> Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate or entitled to claim exempt status.</p><p>Go To: <a href="#">W-4 Tax Information</a></p></div>

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## Update State Tax Information, Continued

Procedures,  
continued



Step	Action
4	<p>If changing your state of residence, select the <b>state</b> you are wanting to elect.</p>  <p>The screenshot shows a blue header bar labeled "State Tax Data". Below it, the "State of Residence:" label is followed by a dropdown menu currently displaying "Maine" with a downward arrow.</p>
5	<p>The following fields are not necessary for state tax election for retirees and are not updateable.</p>  <p>The screenshot shows two red-outlined text input fields. The first is labeled "Tax Status:" and the second is labeled "Total number of Allowances you are claiming:".</p>
6	<p>Enter the <b>additional amount</b> of state tax you want withheld from your retirement pay each month. If you want to remove the additional amount, then just delete the existing amount.</p>  <p>The screenshot shows a blue header bar with the text "Enter Additional Amount, if any, you want withheld from each paycheck:". To the right of this text is a red-outlined text input field containing the value "50.00".</p> <p><b>Note:</b> The minimum amount for state additional tax withholding is \$10.00 and the maximum is \$1000.00.</p>
7	<p>Click the <b>Submit</b> button.</p>  <p>The screenshot shows a red-outlined button labeled "Submit". To its right is a blue-outlined box containing the text: "Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate or entitled to claim exempt status."</p> <p>Below this, the text reads: "If you enter a state that does not have state tax, you will see this error. Click <b>OK</b>."</p>  <p>The screenshot shows a blue header bar labeled "Message". Below it, the text reads: "Cannot enter withholding for state FL. (30001,116)". At the bottom of the box is a yellow-outlined button labeled "OK".</p>
8	<p>Enter your <b>Password</b> and click <b>Continue</b>.</p>  <p>The screenshot shows a blue header bar labeled "Verify Identity" with a "? Help" link on the right. Below the header, the text reads: "To protect your privacy, verify your identity by typing your password. If you are not this user, click <b>Sign Out</b>."</p> <p>Below this, the text reads: "User ID: 1234567".</p> <p>Below that, the text reads: "Password:" followed by a red-outlined password input field containing several dots.</p> <p>At the bottom of the form are two buttons: "Continue" (highlighted with a red outline) and "Cancel".</p>

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## Update State Tax Information, Continued

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Procedures,  
continued

Step	Action
9	<p>The confirmation page should appear. Click <b>OK</b>.</p> <div><p><b>Submit Confirmation</b></p><p> The Submit was successful.</p><p> However, due to timing, your change may not be reflected on the next paycheck.</p></div> <p><b>VERY IMPORTANT:</b> You must click OK for the changes to occur.</p>
10	<p>You will be taken back to the State Tax Information page. If you're done with updating taxes, click on the <b>Home</b> link.</p>

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